

Call Center Continuity

Best Practices Guide

Forward

A successful *Business Continuity* (BC) or *Disaster Recovery* (DR) plan can be heavily attributed to proper planning, stakeholder awareness, and system capabilities. When deploying a cloud based Call Center, it is imperative to incorporate the different situations you may encounter into your continuity or DR plan. Consideration should be given to where queued calls will be sent, including alternative locations, queues, or agents. Because Evolve IP queues calls in the cloud, it is far more likely that local conditions (where agents reside and are presented calls) will drive which of your BC/DR processes or procedures are implemented. Some of the events that require a defined BC/DR process include:

- Power failures
- Inclement weather (Snowstorms, Hurricanes, Flooding)
- Carrier Access (last mile) outages
- Other network interruptions (ISP, Carriers, equipment failures, etc)

The ***Call Center Continuity – Best Practices Guide*** is meant to provide customers with definitions and use cases for Call Center Continuity and DR features that are provided as part of Evolve IP's Call Center product. This guide is not meant to serve as a default process document, but instead as an informational overview of how features perform and common use cases where they are important.

If you need further clarification or have any questions, please contact your Evolve IP Technology Associate, or a Call Center specialist by emailing callcentersupport@evolveip.net.

Invoking DR/BC Features in a Call Center

It is important to understand the definition of agent states and Call Center settings that come into play with some of the Call Center Queue features that handle call distribution and are activated automatically.

Agent states include:

Signed Out: Agents are not actively “joined” to a call center, so they are not included in ACD routing decisions based on Available, Unavailable, or Wrap-Up states.

Unavailable: Agents are actively “joined” to a call center, and marked as unavailable to the ACD(s) that they are joined to. Calls will not be routed to unavailable agents unless Call Waiting is enabled at a Queue level. Agents that are marked unavailable can be forced into an available state by a supervisor or administrator. Unavailable disposition codes can also be applied to this state.

***Note – “Signed Out” and “Unavailable” are the primary conditions that drive queue based DR/BC features**

Signed In: Agents are actively “joined” to a call center, and are included in ACD routing decisions based on Available, Unavailable, or Wrap-Up states.

Available: Agents are actively “joined” to a call center, and marked as available to the ACD(s) that they are joined to. Calls will be routed to Available agents that are idle. If Call Waiting is enabled at a Queue level, calls are presented to Available agents based on ACD policies regardless of whether agent is actively on a call.

When agents are signed in and available inside of a queue, preconfigured settings can force agents to unavailable status. Those settings are:

1. **ACD Consecutive Bounce:** An ACD level setting that defines the number of consecutive bounced calls that force the agent to an “Unavailable” state. All agents, regardless of location or queue, can be set to Unavailable state if they each meet the configured conditions.
 - **Activation** – Automatic when enterprise configured conditions are met
 - **Required Condition/Parameters:** The defined number of consecutive bounced calls (1-5) is reached. The system default, and maximum, is 5 bounced calls.
 - **Accessibility:** Configured via OSSmosis in the “Agent Default Settings” section of the Call Center page
 - **Deactivation:** Automatically deactivated when the agent’s ACD state is made Available by the Agent or their Supervisor
2. **Agent Consecutive Bounce:** An agent level setting that defines the number of consecutive bounced calls that force the agent to an “Unavailable” state that overrides the account level setting.
 - **Activation** – Automatic when user configured conditions are met
 - **Required Condition/Parameters:** The defined number of consecutive bounced calls (1-5) is reached. The system default, and maximum, is 5 bounced calls.
 - **Accessibility:** Configured via OSSmosis in the “Manage Agent” section of the Agents / Supervisors page
 - **Deactivation:** Automatically deactivated when the agent’s ACD state is made Available by the Agent or their Supervisor

Queue Treatments

When implementing a queue (ACD), there are standard features that can be pre-programmed to handle queue distribution when the feature conditions/criteria are met. Some features below are used in both normal production environments and executed specifically in DR scenarios. For information on how to configure any of the features listed below, please review the OSSmosis Advanced Call Center User Guide on the Evolve IP Knowledge Base.

Consideration should be given to configuration of transfer features, ensuring that calls terminate to a specific destination and calls don't go into a "loop" to destinations that may be impacted when an event occurs.

For all of the queue features below, information is provided on the following:

- **Definition**
- **Activation:** How feature is activated, and by whom
- **Required Condition/Parameters:** If applicable, when feature is automatically activated
- **Accessibility:** Where feature can be activated
- **Automated Deactivation:** When feature is deactivated
- **Use Case:** Common DR/BC use cases of when feature may be invoked

			Call Treatment Options					
ACD Policy	ACD Type	Activation	Perform No Action	Play Busy Signal	Transfer Call	Activate Night Service	Play Ringing	Play Announcement
Stranded	Standard, Premium	Auto	X	X	X	X	X	Loop
Stranded-Unavailable	Standard, Premium	Auto	X	X	X	X	X	Loop
Forced Forwarding	Premium	Manual	X		X			Once
Night Service	Premium	Manual	X	X	X	N/A		Once

1. **Stranded** - available to Standard and Premium call centers, this policy allows configuration for ACD calls that are in a call center queue or presented to a queue when it is unstaffed (no agents are signed in)

- **Activation** – automatically activated if pre-configured
- **Required Condition/Parameters:** applied when Calls are left in queue or presented to the queue and queue is unstaffed (all agents are signed out)
- **Accessibility:** Configured through OSSmosis in the “Routing” section of Call Centers
- **Automated Deactivation:** Deactivated when an agent signs into the queue
- **Use Case:** Agents are unable to get into the office due to snow storm to sign into their phones and/or call center agent applications. Business Hours begin without agents signed in. Calls can be automatically:
 - Kept in the queue till someone signs in
 - Treated with Night Service routing policy
 - Transferred to another resource (call center queue, voicemail, alternative phone number or location, etc.)
 - Play ringing, busy, or an announcement to the caller

2. **Stranded - Unavailable** - available to Standard and Premium call centers, this policy that allows configuration of specific routing behavior for calls stranded in a staffed queue when all agents are unavailable

- **Activation** – automatically activated if pre-configured
- **Required Condition/Parameters:** applied when the following conditions are met:
 - **Mandatory condition** - calls are left in queue or presented to queue when all agents are unavailable
 - **Optional Condition** - a customer defined number of agents are in a specified Unavailable state
- **Accessibility:** Configured by an Evolve IP Support Associate or Call Center Specialist. This feature is in development in OSSmosis.
- **Automated Deactivation:** disabled when an agent or agents become Available in the queue

- **Use Case:** Agents have abruptly left their desks during business hours. The “ACD Consecutive Bounce” setting has been met and all calls offered to the queue are rerouted. Some calls still remain in queue. The “Stranded-Unavailable” setting is applied to these calls left in queue and are treated with one of the following options:
 - Kept in the queue till someone signs in
 - Treated with Night Service routing policy
 - Transferred to another resource (call center queue, voicemail, alternative phone number or location, etc.)
 - Play ringing, busy, or an announcement to caller

****Note – “Stranded-Unavailable” is invoked any time all agents are unavailable in a queue. Care should be taken to ensure the setting isn’t invoked outside of DR/BC scenarios, such as all agents going to lunch simultaneously and marking themselves Unavailable***

3. Forced Forwarding: This policy allows ACD calls to be temporarily diverted to a configured destination. The policy can be configured to play an announcement prior to proceeding with the forward.

- **Activation** – manually activated by a Supervisor (from *Web Supervisor*) or an administrator (via *OSSmosis Administrator Portal*)
- **Required Condition/Parameters:** no pre-configured conditions, feature is enabled on-demand by Supervisor or Administrator
- **Accessibility:** Supervisors enable from *Web Supervisor* or an administrator can enable via *OSSmosis Administrator Portal*
- **Deactivation:** policy is deactivated by Supervisor (from *Web Supervisor*) or an administrator (via *OSSmosis Administrator Portal*)
- **Use Case:** The Forced Forwarding policy is useful in scenarios where there is an emergency or no agents are available to staff a call center. In such a situation, the administrator or supervisor can temporarily redirect all new calls to an alternate call center or hunt group extension until the situation is resolved.

4. **Manual Night Service:** available to Premium call centers, this policy allows the Supervisor or Administrator to override the Time Schedule of the queue and manually initiate the queue's Night Service, which would prompt new calls intended for the call center queue to be handled via routing pre-configured in Night Service. A specific announcement can be configured for the Night Service manual override.

- **Activation** – This manual override can be activated by a Supervisor (from *Web Supervisor*) or an Administrator (via *OSSmosis Administrator Portal*)
- **Required Condition/Parameters:** No pre-configured conditions, feature is enabled on-demand by Supervisor or Administrator
- **Accessibility:** supervisors enable from *Web Supervisor* or administrator can enable via *OSSmosis Administrator Portal*
- **Deactivation:** policy is deactivated by Supervisor (from *Web Supervisor*) or an administrator (via *OSSmosis Administrator Portal*)
- **Use Case:** Manual Night Service can be used for times when the call center closes earlier than usual due to a holiday, special event, or an operational problem. An alternative "Manual Mode Announcement" can be configured that will play when Manual Night Service is activated and allows the usual Night Service announcement to remain unchanged.

***Note – Night Service must be configured on the queue, and not the Auto Attendant resource that sits in front of the queue.**

Agent/User Features

In a DR/BC scenario, it is important to consider if agents affected by certain conditions will be taking calls. For instance, a company may decide to implement a Business Continuity plan that involves agents taking calls from alternate phones (cell phones, home phones, or another corporate location) during a snow storm or other circumstance that prohibits them from getting to the office. Conversely, it may be determined that an organization does not allow agents to field ACD calls if not at their desks.

The following features can be utilized by Premium PBX users that are call center agents to receive calls during an event. The user features can be invoked when their handset is not accessible and Evolve IP continues to process incoming calls to the queue. Some common examples of when an agent's phone would be inaccessible include:

- Weather prohibits the agent from getting into the office or call center location
- Handset loses connectivity to the Evolve IP platform, in scenarios such as:
 - a. Internet connections, including telecom circuits, drop and there is no failover
 - b. Local hardware failure, such cables, switches, routers, etc.
 - c. Carrier level or equipment connectivity failure preventing phones from registering to Evolve IP platform

Feature definitions, configuration and activation procedures are documented in this section. A summary of agent features and activation options that can be utilized in a BC/DR event are:

Feature	Seat Type	Activation Options			
		Personal Portal (Web)	Voice Portal	OSSmosis Admin (Web)	Evolved Office Toolbar
Anywhere	Premium	X	X	X	X
Remote Office	Premium	X	X	X	X

1. **Anywhere:** The *Anywhere* feature allows Premium PBX users to define one or more phone numbers or network locations (soft clients or other applications) that can be used as extensions to your profile. Calls are delivered to all phone numbers or locations that are enabled in the user's *Anywhere* profile.

Typical Use Case

Anywhere is best used for DR/BC when phones unexpectedly lose connectivity to the Evolve IP platform.

Configuration Procedures

1. **User Configuration** – Note that the Anywhere feature can be pre-configured during implementation, configured via the Personal Portal, the Evolved Office Toolbar, or in the OSSmosis Admin Portal at any time
In the OSSmosis Admin Portal

The *Anywhere* feature will be enabled for agent(s) setup as Premium PBX Users by Evolve IP during Implementation or by contacting Support at support@evolveip.net.

In the OSSmosis Admin Portal

- a. Navigate to Telephony Setup-> Account Users -> Services -> Anywhere **Configure** Button

EVOLVE OSSMOSIS ADMINISTRATION

Evolve IP OSSmosis Portal > Configure User Anywhere Feature

[Save](#)[Close this Window \(without saving\)](#)

The Anywhere Feature allows employees to make and receive calls from any device, at any location.

With the Anywhere Feature, you can move calls seamlessly from your desk phone to your mobile phone at will, and transfer or conference with your colleagues from your mobile with the Anywhere solution.

Account Name:
Group Name:
User Id:

Phone Number:

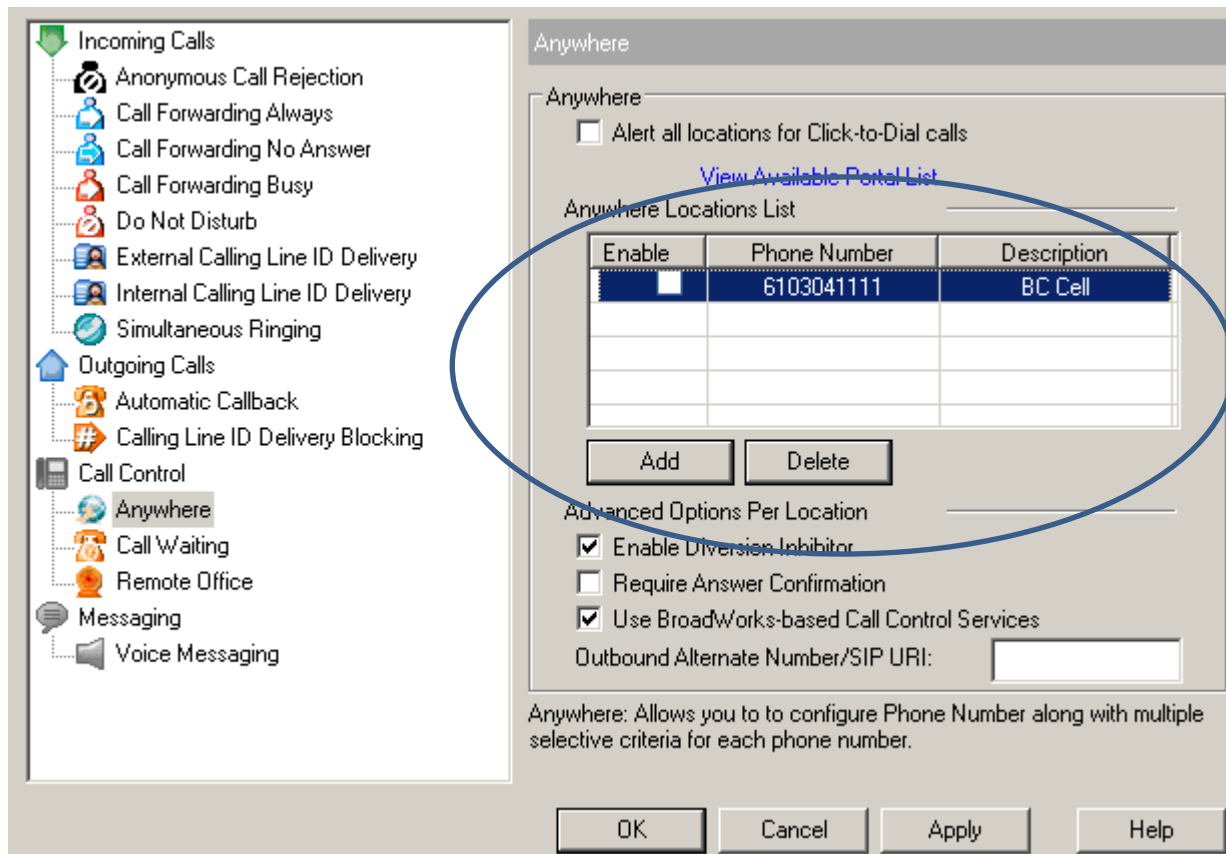
Description:

- ☐ Active
- ☐ Enable Diversion Inhibitor
- ☐ Require Answer Confirmation
- ☐ Use BroadWorks Call Control

- b. Enter the Phone Number that will be used in BC/DR event
- c. Make sure the "Active" box is **UNCHECKED** for normal operations
- d. Press "Save"
- e. Document the Portal # for feature activation (can be programmed as contact in cell phones)

In the Evolved Office Assistant Toolbar

- a. The *Anywhere* feature will be enabled for the account and the agent(s) by Evolve IP during Implementation or by contacting Support at support@evolveip.net.
- b. In the Evolve IP Toolbar, go to Services -> Anywhere -> Click on "Add" under locations list
- c. Enter the Phone Number that will be used in BC/DR event
- d. Press "OK"



- e. Make sure "Enable" box is **UNCHECKED** for normal operations
- f. Document the Portal # for feature activation (can be programmed as contact in cell phones)

In the Personal Portal

- a. The *Anywhere* feature will be enabled for the account and the agent(s) by Evolve IP during Implementation or by contacting Support at support@evolveip.net.
- b. In the Personal Portal, go to Advanced Features ->Anywhere Settings
- c. Enter the Phone Number that will be used in BC/DR event
- d. Press "Save Changes"

[Welcome](#) | [Account](#) | [Basic Features](#) | **[Advanced Features](#)** | [Call Center](#) | [Voicemail/JM](#) | [Directories and Speed Dials](#) | [Conferencing](#) | [Pref](#)

[Simultaneous Ring](#) | [Remote Office](#) | **[Anywhere Settings](#)**

[Anywhere Settings](#) | User Anywhere settings updated | [Clear Messages](#)

[Save Changes](#)

The **Anywhere** feature allows you to utilize your mobile phone (or home phone, hotel phone, alternate office phone, etc...) as if you are making and receiving calls on your desk phone to your mobile when you need to take an important call home with you, move a call from your mobile to your fixed phone at will and transfer or conference extension.

Note: It is highly recommended that Simultaneous ring and Remote Office be disabled when using the Anywhere feature.

To use this function, put your mobile phone number in the "Phone Number" field and check the "Active" checkbox. Be sure to "Save" those changes.

Placing outgoing calls:

- Dial the Portal Phone Number from the number entered in the previous step (available portal numbers will be listed at the top of the "Anywhere Settings" page)
- You will be prompted for your passcode - enter your voice portal passcode,
- You will then be prompted for the phone number to dial, key it in on your phone. The caller will see the caller id information as though you had placed the call from your desk phone.

Receiving calls: Your configured mobile (or other) phone will ring at the same time as your office phone. You can answer the call on either phone and it will appear to be coming from your desk phone.

Move Active Call from your Desk Phone or Soft Client to your Mobile:

- From your mobile, dial "Portal Phone Number".
- Enter your voicemail passcode followed by #.
- When you hear the tone, dial *11 and you will immediately be connected with the original caller.

Move Active Call from your Mobile to your Desk Phone or Soft Client: (The call must be originated using the method described above for "Placing outgoing calls")

- While engaged in a call on your mobile, dial *11 from your desk phone or soft client. The call is seamlessly moved to the new phone and the mobile call leg is terminated.

Available Anywhere Portal(s)		
Portal Name	Phone Number	Extension
bwa-0001005437-1	484-320-2352	2352
bwa-6102300832		2355

Phone Number:

Description:

☐ Active

☐ **Enable Diversion Inhibitor** prevents calls that ring to an alternate internal extension to be further redirected by the second extension's call flow settings.

☐ **Require Answer Confirmation** when a call rings to a secondary phone, Answer Confirmation prompts the user to press any key to confirm. This is useful when mobile and alternate phones ring but you do not wish to answer work related calls.

☐ **Use Telephony Call Control** Calls can be controlled (hold, transfer) from the alternate device that they are answered on.

- e. Make sure "Active" box is **UNCHECKED** for normal operations
- f. Document the Portal # for feature activation (can be programmed as contact in cell phones)

2. Activation – In the event that handsets lose connectivity to the Evolve IP platform, and no other queue based BC routing policy is automatically implemented, the following procedure can be followed to activate the anywhere feature on a specific device/phone number and agents will continue to receive calls on the activated phone number via normal queue routing policies.

- a. Dial the Anywhere Portal # from the phone number pre-configured
- b. Enter the user's voice portal password
- c. Dial *12#
- d. Anywhere will be activated on that phone number

3. Deactivation – When handset connectivity is restored, the following procedure can be followed to deactivate the anywhere feature

- a. Dial the Anywhere Portal # from the phone number pre-configured
- b. Enter the user's voice portal password
- c. Dial *13#
- d. Anywhere will be deactivated on that phone number

2. **Remote Office:** The *Remote Office* feature allows you to use your home phone, your cell phone or any other 10-digit phone number as your business phone. This feature redirects all calls coming to your business phone to the remote office phone.

Typical Use Case

Remote Office is best used for DR/BC when agents or users cannot get to their office to field ACD calls due to weather emergency, power outage, etc.

Configuration Procedures

1. **User Configuration** – Note that the Remote Office feature can be pre-configured during implementation. Post implementation, this feature can be configured via the Personal Portal, the Evolved Office Toolbar, or in the OSSmosis Admin Portal.

In the OSSmosis Admin Portal

The *Remote Office* feature will be enabled for agents setup as Premium PBX Users by Evolve IP during Implementation or by contacting Support at support@evolveip.net.

In the OSSmosis Admin Portal

- a. Navigate to Telephony Setup-> Account Users -> Services -> Remote Office **Configure** Button

EVOLVE  OSSMOSIS ADMINISTRATOR PORTAL

Evolve IP OSSmosis Portal > Configure Remote Office Settings

Save Close this Window (without saving)

Remote Office allows you to use your home phone, your cell phone or even a hotel phone as your business phone. By using remote phone and have them billed to your business. This service also directs all calls coming to your business phone to ring

Account Name:
Group Name:
User Id:

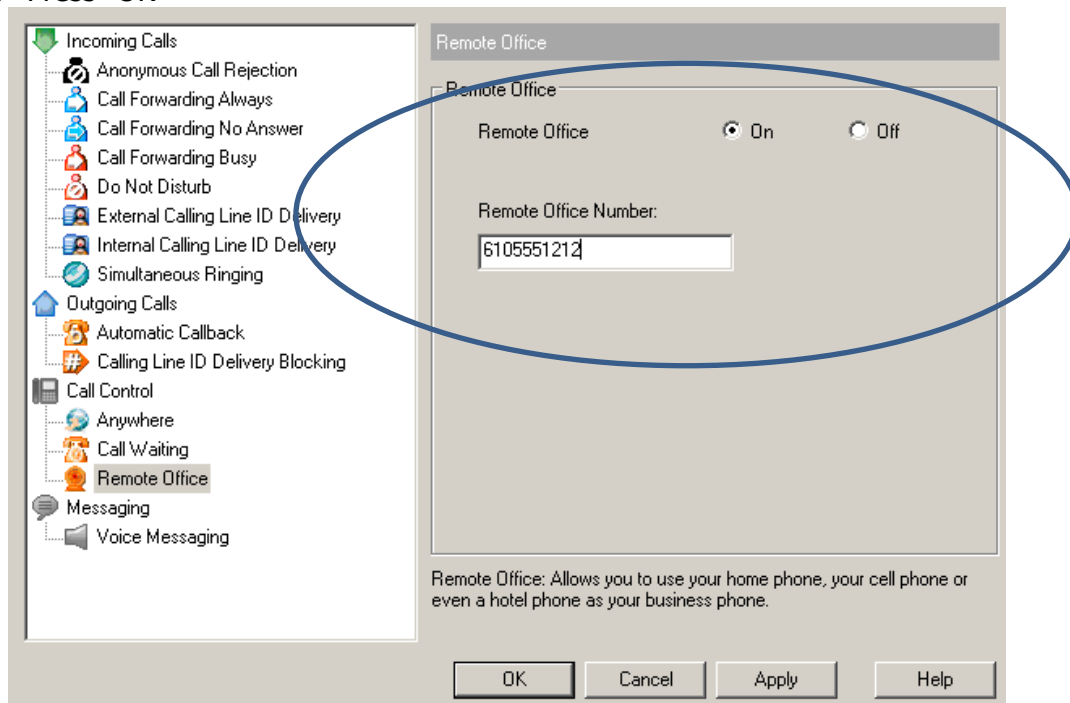
☐ Enable Remote Office

Phone Number:

- b. Enter the Phone Number that will be used in BC/DR event
- c. Make sure the "Enable Remote Office" box is **UNCHECKED** for normal operations
- d. Press "Save"

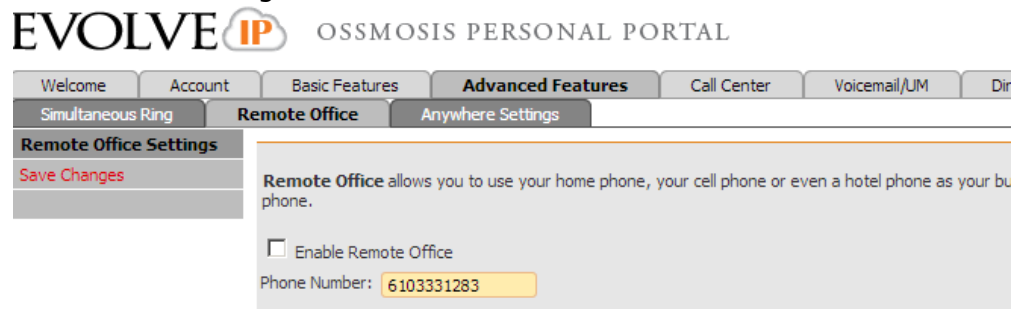
In the Evolved Office Assistant Toolbar

- The *Remote Office* feature will be enabled for the account and the agent(s) by Evolve IP during Implementation or by contacting Support at support@evolveip.net.
- In the Evolve IP Toolbar, go to Services ->Remote Office -> Click "On"
- Enter the Phone Number that will be used in BC/DR event
- Click "Off"
- Press "OK"



In the Personal Portal

- The *Remote Office* feature will be enabled for the account and the agent(s) by Evolve IP during Implementation or by contacting Support at support@evolveip.net.
- In the Personal Portal, go to Advanced Features ->Remote Office Settings
- Enter the Phone Number that will be used in BC/DR event
- Press "Save Changes"



- Make sure "Enable Remote Office" box is **UNCHECKED** for normal operations

2. **Activation** – In the event that agents cannot get into the office, and no other queue based BC routing policy is automatically implemented, Remote Office can be activated from any of the following locations.
 - a. **Admin Portal** – Under User Settings described above, select “Enable Remote Office” and “Save”
 - b. **Personal Portal** – Select “Enable Remote Office” and Save
 - c. **Toolbar** – Select “On” -> “Apply” -> and “OK”
3. **Deactivation** – When agents no longer are required to field calls from the alternate phone, the following procedure can be used to deactivate Remote Office
 - a. **Admin Portal** – Under User Settings described above, uncheck “Enable Remote Office” and “Save”
 - b. **Personal Portal** – Uncheck “Enable Remote Office” and Save
 - c. **Toolbar** – Select “Off” -> “Apply” -> and “OK”

Key Resources

Evolve IP Personal Portal –

<https://evolveip.my-cloud-manager.com/PersonalPortal/login.jsp>

Evolve IP OSSmosis Admin Portal –

<https://evolveip.my-service-manager.com/ServiceManager/login.jsp>

Evolve IQ Knowledge Base –

<http://support.evolveip.net/kb/>

Support # - (610) 964-8000 Opt. 5

Training – Evolve IP provides free customer training on features and settings provided in this document on the first Wednesday of every month. Registration is required, and the full public training calendar can be viewed at:

https://learning.meeting.evolveip.net/perl/ilinc/lms/event.pl?div_view=reg&event_user_id=